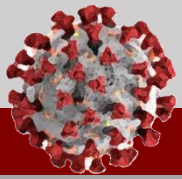
Quick Reference for Supervisors

COVID-19 Community Team Outreach



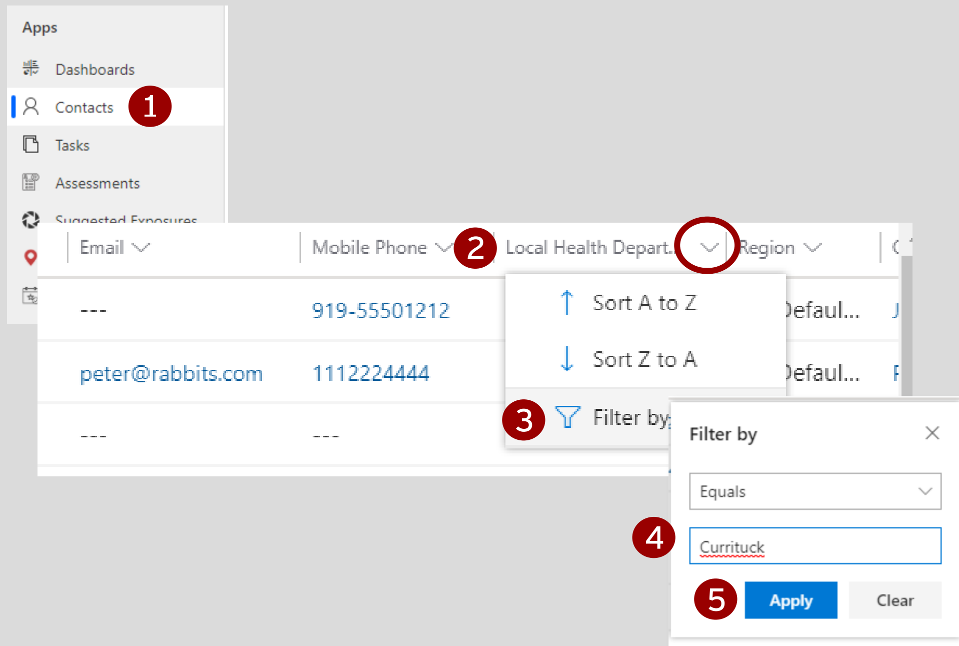
Review how to filter for your LHD and check for contacts who have not yet completed assessments:

Filter Active Contacts by your LHD

Begin by reviewing all contacts for your local health department:

1. Begin on the Contacts Tab.
2. Select the arrow next to the "Local Health Department" column header.
3. Choose "Filter by."
4. Input your desired criteria.
5. Press "Apply."

1. **Contacts Tab**
2. **Column Headers**
3. **"Filter by" button**
4. **Input Criteria**
5. **"Apply" button**

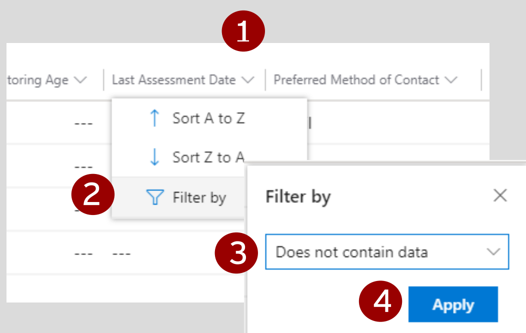


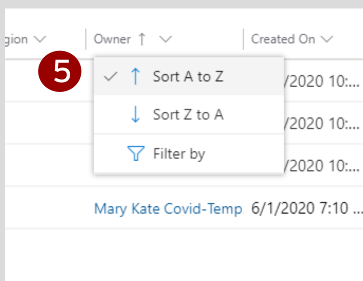
Check for Missing Assessments

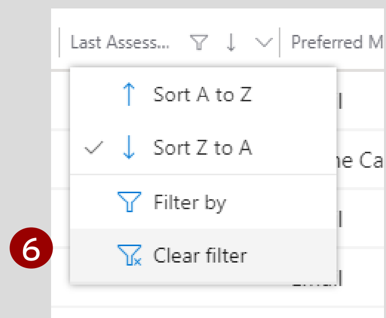
Without leaving your LHD view, you can review contacts who haven't completed assessments:

1. Select the arrow next to the "Last Assessment Date" column header.
2. Choose "Filter by."
3. In the "On" dropdown, select "Does Not Contain Data" to see contacts who have never completed an assessment.
4. Press "Apply."
5. Sort the "Owner" column A → Z to review the Contact Tracers for these contacts.
6. After reviewing this information, clear your "Last Assessment Date" filter by returning to this column and clicking "Clear filter."

1. **Last Asmt. Date Column**
2. **"Filter by"**
3. **"On" Dropdown**
4. **"Apply"**
5. **Owner Column**
6. **"Clear filter"**



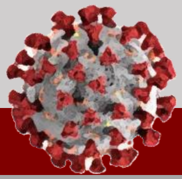




REMINDER ABOUT ASSESSMENT DATES:

If a contact's response to the "Agreement" field is left **blank** (indicated by "---" in this column in the Assessments Tab) in either a digital assessment that did not receive a response or in a manual assessment, the "Last Assessment Date" field on their profile will not populate when the contact resumes their assessment. **To populate this date, you can choose "No. I do not want to participate" for digital assessments that weren't completed, and "Yes, I agree to participate" for any assessments you input during phone calls with a contact.** This issue will be fixed in a later software version.

"Agreement" field within a manual assessment



Quick Reference for Supervisors

COVID-19 Community Team Outreach

Review how to see contacts who have stopped completing assessments or who have become inactive:

Check for Late Assessments

After clearing your filter, you can also review contacts who have opted in but missed an assessment:

1. Select the arrow ⌄ next to the "Last Assessment Date" column header and sort Z → A.
2. Select "Filter by"
3. In the "On" dropdown, select "On or before," and use the calendar to select yesterday's date.*
4. Click "Apply." This produces a list of all the contacts who have previously completed an assessment but have missed today and/or yesterday.
5. Sort or filter on the "Owner" column and review the Contact Tracers for these contacts.

**Depending upon your preference and policy, you may also choose to use today's date.*

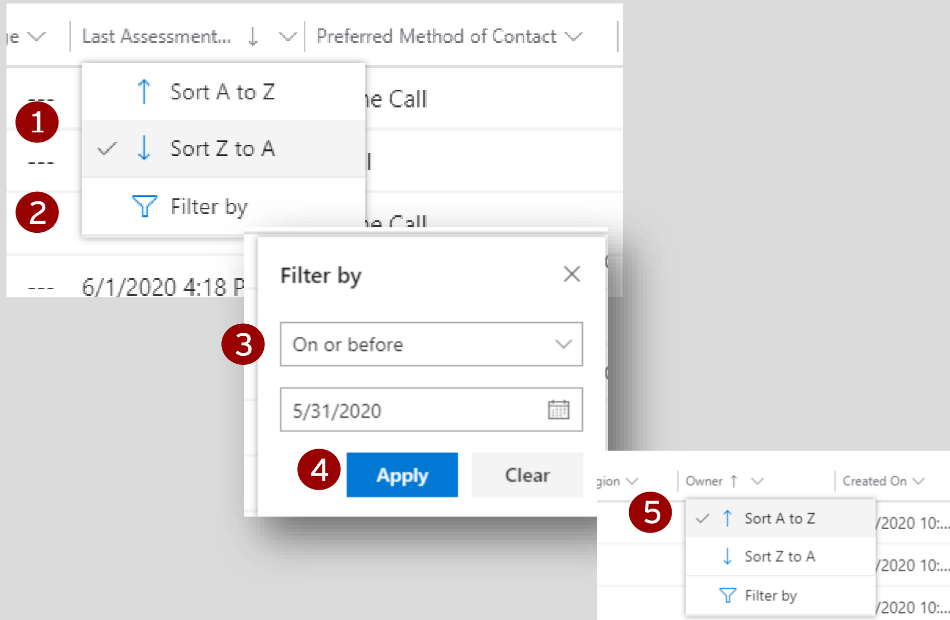
1 **"Sort Z → A"**

2 **"Filter by"**

3 **"On"/Calendar Dropdowns**

4 **"Apply"**

5 **Owner Column**



Review Inactive Contacts

Inactive contacts will have been manually marked as "Inactive" by Contact Tracers. To review for your LHD:

1. From the Contacts Tab, select the arrow ⌄ next to "Active Contacts" and toggle to "Inactive Contacts."
2. Select the Advanced Filter icon
3. Click "Add" and select "Add row."
4. In the new dropdowns that appear, select "Local Health Department" and type the name of your LHD after "Equals."
5. Press "Apply" to see a list of inactive contacts for your LHD.

1 **"Inactive Contacts"**

2 **Advanced Filter**

3 **"Add row"**

4 **"Local Health Dept."**

5 **"Apply"**